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Perspective

An analysis of RVB's monthly survey of its Dealer Advisory Board Members

GAYLORD MAXWELL

	NEW						USED					
	FOR MONTH			YEAR-TO-DATE			FOR MONTH			YEAR-TO-DATE		
	JAN '85	JAN '84	% CHANGE	1985	1984	% CHANGE	JAN '85	JAN '84	% CHANGE	1985	1984	% CHANGE
MOTORHOMES	84	87	– 3%	-0-	-0-	-0-	71	82	– 13%	-0-	-0-	-0-
TRAVEL TRAILERS	38	61	–38%	-0-	-0-	-0-	43	45	– 4%	-0-	-0-	-0-
TRUCK CAMPERS	11	7	+57%	-0-	-0-	-0-	6	5	+ 20%	-0-	-0-	-0-
CAMPING TRAILERS	63	53	+18%	-0-	-0-	-0-	4	10	– 60%	-0-	-0-	-0-
FIFTH-WHEELS	20	29	–31%	-0-	-0-	-0-	10	4	+150%	-0-	-0-	-0-

	FOR MONTH			YEAR-TO-DATE		
	JAN '85	JAN '84	% CHANGE	1985	1984	% CHANGE
SALES VOLUME	$6,311,315	$6,392,018	–1%	-0-	-0-	-0-
TOTAL UNIT SALES	350	383	–8%	-0-	-0-	-0-
NEW UNIT SALES	216	237	–8%	-0-	-0-	-0-
USED UNIT SALES	134	146	–8%	-0-	-0-	-0-

The year started off a bit on the minus side. January reports from RVB's Dealer Advisory Board (DAB) show that the average dealer was down slightly from the previous year. Thirteen of the 22 DAB dealers were down in sales volume from the previous January; nine were up. Although no particular size or type of dealer seems to have the key to success to start out the year, it appears that the larger motorhome specialists manage to hold or improve their positions better than the smaller dealerships.

As is usual during this time of the year, overall profits were rated lower than usual due to "blowing-out" old inventory. There were few excellent ratings.

Reports of dealers going out of business are becoming common. One DAB member says that several marginal operations have closed up in his area and he expects others to follow suit.

It will be a tough year. Indications are that the market will be down from '84—probably not much, but definitely down. There will be a fight for sales, which means lower grosses. Good management can overcome that factor; bad management can easily sink the ship in such stormy seas.

The overall picture, however, is reasonably good. Although it is probable that sales will be down somewhat, the fact is that the RV market will be good for many dealers. There is plenty of opportunity in the RV marketplace in 1985.

MOTORHOMES

The slight drop from last January isn't impressive. The fact that motorhome sales showed a fairly consistent decline each month during the latter part of last year indicates that dealers of this RV type may be facing a stiff fight for sales. Also, the fact that many motorhome dealers rated profits poor to fair suggests that it will be difficult to get good grosses in highly competitive areas. Adding to the problem in some areas will be the discounts offered by those who are going out of business. Still, a lot of motorhomes will be sold in '85, with many excellent profits. Good managers will get their share.

TRAVEL TRAILERS

Trailers took it on the chin in '85. The DAB's report for January indicates that it will be another slower-than-normal year for this RV type. No one has the answer for the slowdown, but it is definitely a market condition. Trailer specialists might be wise to consider adding other RV types this year.

TRUCK CAMPERS

The percentages of increase look good; actual unit sales do not reflect a boom, however. Perhaps the increase does suggest a better year for slide-ons. Profits were rated excellent by the dealer who sold most of the units included in this report.

CAMPING TRAILERS

Last year, camping trailers started out with a bang. It looks like a repeat performance this year. In the latter part of '84, however, the early gains were lost. It is hoped that it won't be the case this year. Profits were rated poor to fair for the month.

FIFTH-WHEELS

Fivers took a drastic drop in January. After a couple of years of strong sales, that is surprising. Both of the DAB dealers who specialize in fifth-wheels were down for the month. Profits were rated good. Δ

Perspective is a compilation of data provided by RVB's Dealer Advisory Board (DAB), a group comprised of 23 dealers representing a cross-section of the U.S. Dealer body. This report is an attempt to reflect the current retail sales picture; it does not purport to indicate RV production or factory sales to dealers.

RVIA, JANUARY

The marketing committee of the Recreation Vehicle Industry Association (RVIA) has announced that the total number of recreational vehicles shipped from manufacturers' plants during January 1985 was 28,900 units, down 0.3% from January 1984.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of Allen Yoder Jr. of Jayco Incorporated, Middlebury, Indiana.

RV shipments were as follows in Jan. 1985		Jan. 1984	Percent Change	Cumulative 1985	Cumulative 1984	Percent Change
TRAVEL TRAILERS	5,000	7,100	-29.6%	5,000	7,100	-29.6%
FIFTH-WHEELS	1,600	1,500	+ 6.7%	1,600	1,500	+ 6.7%
TRUCK CAMPERS	400	300	+33.3%	400	300	+33.3%
MULTI-USE VEHICLES	13,400	11,000	+21.8%	13,400	11,000	+21.8%
TYPE A: MOTOR-HOMES	3,200	3,400	- 5.9%	3,200	3,400	- 5.9%
TYPE B: VAN CAMPERS	500	400	+25.0%	500	400	+25.0%
TYPE C: MINI MOTOR-HOMES	2,200	2,800	-21.4%	2,200	2,800	-21.4%
FOLDING CAMPING TRAILERS	2,600	2,500	+ 4.0%	2,600	2,500	+ 4.0%
TOTALS	28,900	29,000	- 0.3%	28,900	29,000	- 0.3%

WDA QUARTERLY SALES FIGURES

RV Business publishes a quarterly report of sales statistics from the Warehouse Distributors Association (WDA). The chart shown here is based upon a representative sampling of WDA members, as compiled in the fourth quarter of 1984. While these statistics are not intended to be fully indicative of the sales volume among distributors in the RV and MH industries, they are presented here as an insight into the supplier/distributor industry.

SALES VOLUME

	FOURTH-QUARTER SALES VOLUME	
	PERCENT CHANGE 1983 to 1984	RANGE OF CHANGE
REGION 1	+ 5.3%	+28.6% to -14.3%
REGION 2	+18.4%	+34.1% to -52.1%
REGION 3	+ 8.0%	+28.0% to -14.7%
REGION 4	- .9%	+22.4% to -23.4%
REGION 5	+ 6.5%	+69.8% to -55.4%
REGION 6	+11.1%	+98.7% to -13.4%

Region 1: Connecticut, Delaware, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Virginia, West Virginia and Washington, D.C.; **Region 2:** Alabama, Florida, Georgia, Mississippi, North and South Carolina, and Tennessee; **Region 3:** Illinois, Indiana, Iowa, Kentucky, Michigan, Minnesota, Missouri, Nebraska, North and South Dakota, Ohio and Wisconsin; **Region 4:** Arkansas, Colorado, Kansas, Louisiana, Oklahoma, New Mexico and Texas; **Region 5:** Alaska, Arizona, California, Hawaii, Idaho, Montana, Nevada, Oregon, Utah, Washington and Wyoming; **Region 6:** Canada.